

## **CASE CLOSURE**

### **I. POLICY SUMMARY**

The Vision Rehabilitation Specialist (VRS) shall close an individual's case record of service when the specialist determines:

- The client and the VRS agree an individual has successfully met his/her goals as identified on the plan.
- The client has attained increased independence in the goal(s) stated on the plan.

### **II. PROCEDURES FOR INDIVIDUALS WHO HAVE MET THEIR GOALS**

The client's case will remain open for three months after the VRS and the individual agree the goals have been met and further services are not required. The VRS should contact the client one time (can be a telephone contact) during this time period to maintain the relationship and ensure the client continues to do well. A final contact with the client will occur to ensure services are no longer required.

Final Contact:

- The VRS will schedule either a home visit or telephone appointment to review with the client the initial assessment to determine that the individual is not requiring assistance from the VRS in *any areas* of the assessment. This review would include areas in which services have been provided, as well as areas in which the individual declined a need for services during the initial assessment. This review can assist the VRS in confirming that the individual does not require additional services.
- It should be made clear to the individual when services have been completed that the individual may receive further services if his/her situation changes in the future.
- The client should be informed that upon case closure a survey will be sent requesting feedback on the services provided.

When the VRS determines that the case is ready for closure, the case in AWARE ND is closed and the satisfaction survey is sent.

In rare occasions and after consultation with the State Office Vision Rehabilitation Administrator, a case record may remain open in excess of three months after the client has achieved their goals on their plan. Documentation and rationale for maintaining the case record as open is included in AWARE ND as a case note.

### **III. PROCEDURES FOR INDIVIDUALS WHO ARE NO LONGER AVAILABLE FOR SERVICES**

There are some circumstances that may arise which lead to the individual no longer being available for services. These circumstances include the individual:

- moves into a skilled nursing facility
- moves out of state
- passes away
- refuses services
- cannot be located

In these situations, document the reason for closure with the appropriate closure reason and response to the closure questions.

### **IV. OPENING A NEW CASE VS. BACKING OUT A CLOSURE**

At times, an individual whose case has been closed may request additional services. This could be the result of additional areas of need, change in vision, or change in level of support in the home environment. In most situations opening a new linked case will be required. In the rare circumstance a closure needs to be backed out to follow up on a previously provided service, the VRS should consult with the state office. An example of when a closure would be backed out would be when a client requests follow up for previously provided services and the case has been closed for less than two months.